

# Using SharePoint

**MMB Budget Division Document Management SharePoint site**

Revised August 2017

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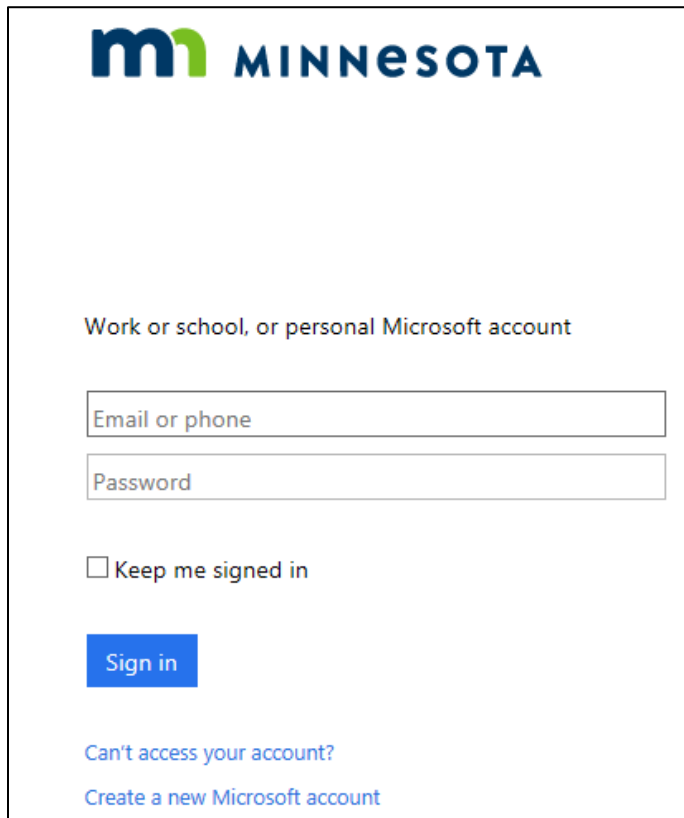
## **SharePoint Access, Login and Assistance**

### **Access**

Request access to the Budget Division Document Management SharePoint site with the [Budget Systems User Authorization Form](#) and email to [budget.finance.mmb@state.mn.us](mailto:budget.finance.mmb@state.mn.us).

### **Login**

The Budget Division Document Management SharePoint site is available at: <https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx>. After clicking on the link, it will require you to login using the screen shown below.



The image shows a Microsoft login interface for the state of Minnesota. At the top is the 'mn MINNESOTA' logo. Below it is the text 'Work or school, or personal Microsoft account'. There are two input fields: 'Email or phone' and 'Password'. Below these fields is a checkbox labeled 'Keep me signed in'. A blue 'Sign in' button is positioned below the checkbox. At the bottom of the form, there are two links: 'Can't access your account?' and 'Create a new Microsoft account'.

Follow the instructions below if you are on the MN.IT Network or not on the MN.IT Network. You are a MN.IT Network User, i.e., if your email has “@state.mn.us” in your email address.

### **MN.IT Network Users**

To login, use your state email address and click or tab out of the email field. The website should recognize your email from Outlook and will automatically log you into Microsoft Office 365, you should only need to enter your password if you are outside of the state network.

If you have a work or school account and a personal account, you may need to choose which one to access as shown below.



It looks like [redacted]@state.mn.us is used with more than one account. Which account do you want to use?



Work or school account

Created by your IT department  
[redacted]@state.mn.us



Personal account

Created by you  
[redacted]@state.mn.us

Back

Tired of seeing this? [Rename your personal Microsoft account.](#)

### New User to the Budget Division Document Management SharePoint Site

If you are a MN.IT Network Users and are requesting access to the site for the first time through the authorization form, once the SharePoint site has been shared with you by MMB Budget Planning and Operations, you should receive an email with a link to the site. The message will be sent from [no-reply@sharepointonline.com](mailto:no-reply@sharepointonline.com). The subject line will contain the name of the person who initiated the sharing request. The personal invitation text will appear below the greeting.

**From:** Kimber, Chardae (MMB) [<mailto:no-reply@sharepointonline.com>]

**Sent:** Monday, May 22, 2017 5:22 PM

**To:** [redacted]

**Cc:** Kimber, Chardae (MMB) <[chardae.kimber@state.mn.us](mailto:chardae.kimber@state.mn.us)>

**Subject:** Kimber, Chardae (MMB) has invited you to 'Budget Division Document Management'

Here's the site that Kimber, Chardae (MMB) shared with you.

Go to [Budget Division Document Management](#)

[Follow](#) this site to get updates in your newsfeed.



Get the SharePoint mobile app!

Upon clicking the site link from the email, you will be asked to sign in with either your organization's O365 account or another Microsoft account associated with your email address. Sign on with the Organizational account and enter your state email address. You should not need to enter your password unless you are accessing the SharePoint site from outside of the State network.



## Non-MNIT Network Users (External Partner Users)

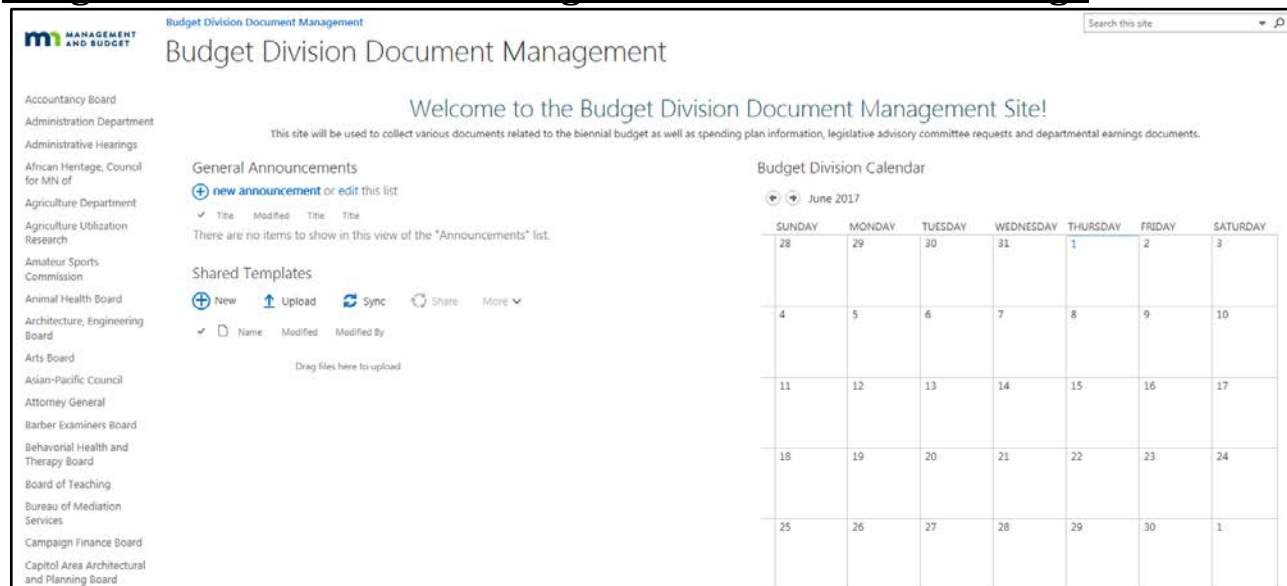
**External users** are users who need access to a MNIT-hosted SharePoint site and are not part of the Outlook Global Address List. This includes most individuals that have an email address that does not end in "@state.mn.us."

See [Appendix A](#) for detailed instructions for accessing the MMB Budget Division Document Management SharePoint site.

## Assistance

Email the MMB Budget Operations email box at [budget.finance.mmb@state.mn.us](mailto:budget.finance.mmb@state.mn.us) if you have any access questions or questions related to SharePoint features or functions. MMB will review all emails and work with MN.IT services, if more technical expertise is needed.

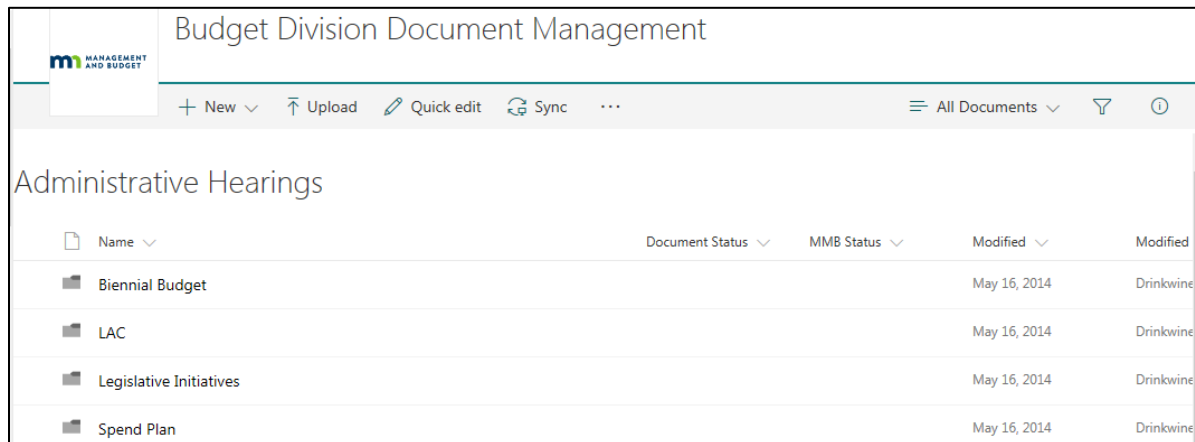
## Budget Division Document Management SharePoint Home Page



1. All state agency libraries are listed down the left-hand side of the page
2. The Shared Templates library contains documents and information that all agencies can access
3. The announcements and calendar features display announcements and dates related to the budget related processes. This section is updated by MMB.

## **The Agency Library**

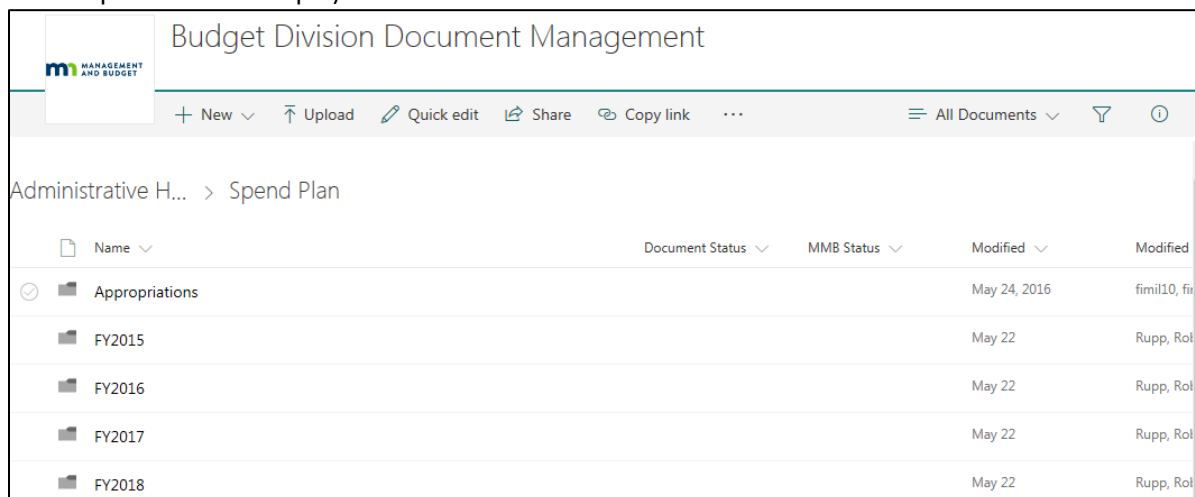
Click on your agency name to enter the agency library. Each agency library has the same folders.



Name	Document Status	MMB Status	Modified	Modified
Biennial Budget			May 16, 2014	Drinkwine
LAC			May 16, 2014	Drinkwine
Legislative Initiatives			May 16, 2014	Drinkwine
Spend Plan			May 16, 2014	Drinkwine

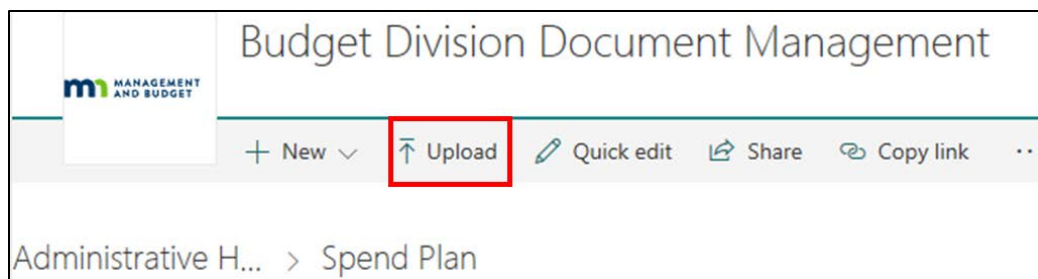
## **Uploading a Document to the SharePoint Site**

1. Click the folder to which you would like to upload your document and open the folder (Spend Plan folder open in this example)



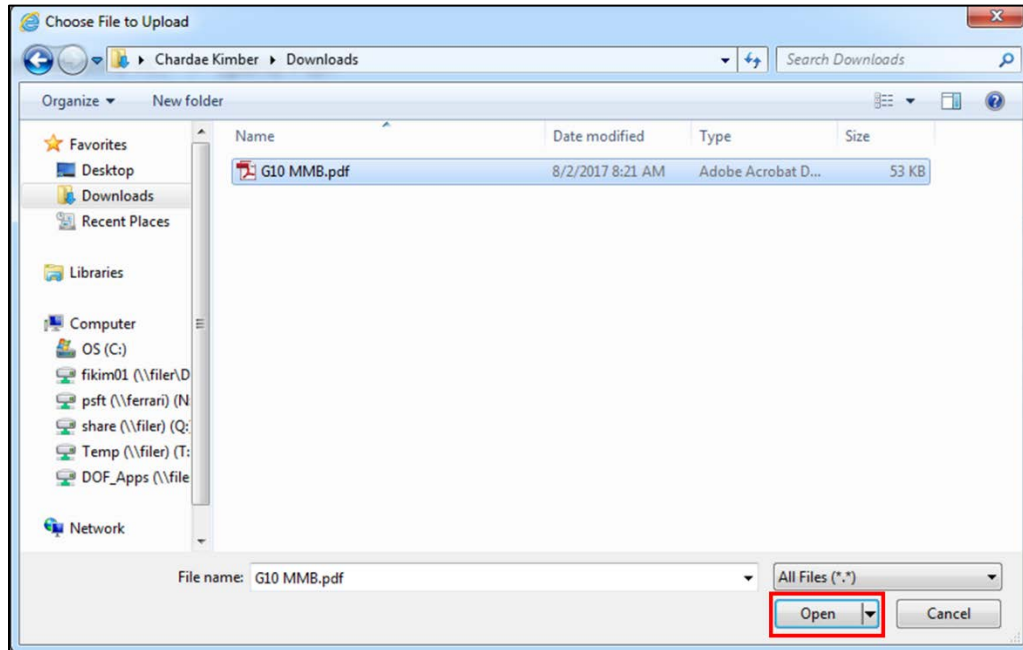
Name	Document Status	MMB Status	Modified	Modified
Appropriations			May 24, 2016	fimil10, fi
FY2015			May 22	Rupp, Rol
FY2016			May 22	Rupp, Rol
FY2017			May 22	Rupp, Rol
FY2018			May 22	Rupp, Rol

2. Select Upload once you are in the appropriate folder

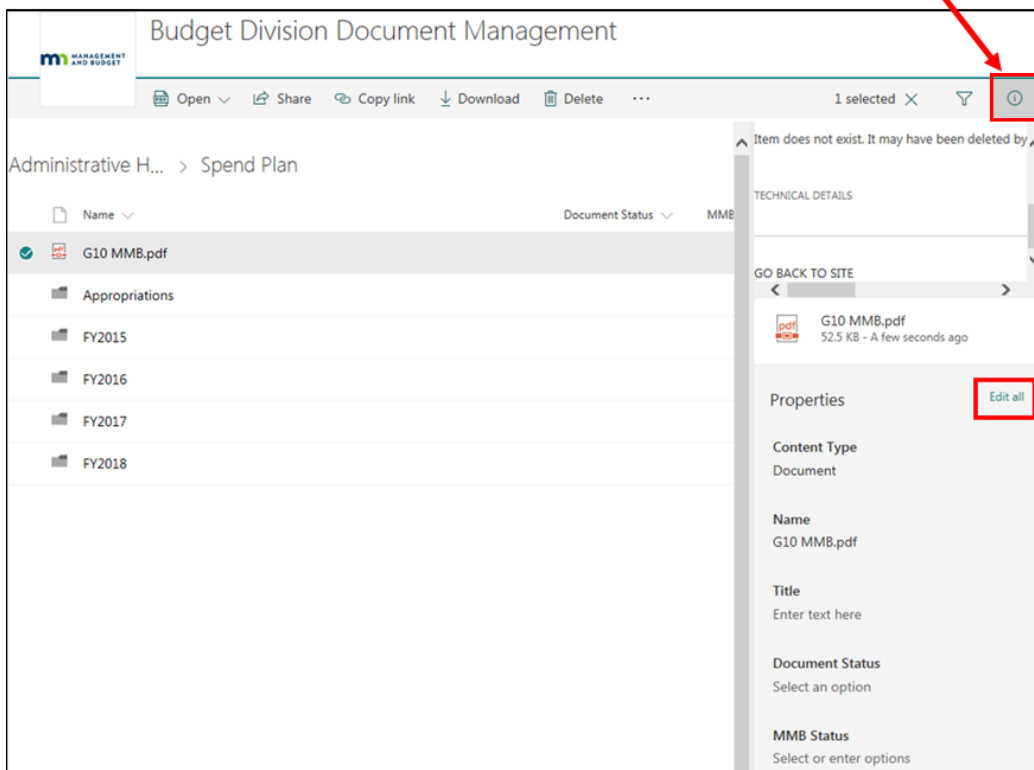


Name	Document Status	MMB Status	Modified	Modified
Appropriations			May 24, 2016	fimil10, fi
FY2015			May 22	Rupp, Rol
FY2016			May 22	Rupp, Rol
FY2017			May 22	Rupp, Rol
FY2018			May 22	Rupp, Rol

3. The document finder will open allowing you to choose a file to upload. Select the document (s) you wish to upload and then select Open and it will be uploaded.



4. The uploaded document properties can be changed by selecting the document and clicking on the Edit All link on the right hand details menu. Note: you may have to open the Details Pane



5. Change the document's properties then select Save

Administrati... > Spend Plan > G10 MMB.pdf

Content Type  
Document

Name  
G10 MMB .pdf

Title  
Enter text here

Document Status  
Select an option

MMB Status  
Select or enter options

Save Cancel

## Uploading Multiple Documents to the SharePoint Site

1. Navigate to the folder that you wish to upload your documents to and click on it.
2. Drag your documents to the open folder where it says “Drag files here to upload” (this example shows the FY 2018 folder within the Spend Plan folder).
3. In the top right corner, it will indicate that there is an upload in progress.

Budget Division Document Management

+ New Upload Quick edit Share ... Uploading 1 item All Documents

Administrative H... > Spend Plan > FY2018

This folder is empty  
Drag files here to upload.

Has Access  
Manage access

Recent Activity

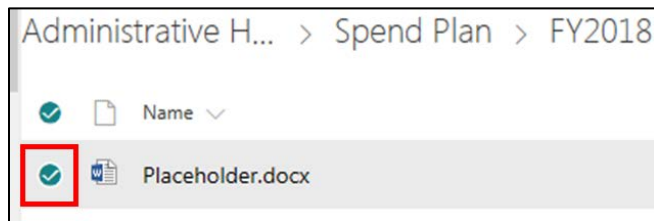
Information  
Type  
Folder  
Modified  
May 22  
Path  
Administrative Hearings > Spend Plan > FY2018



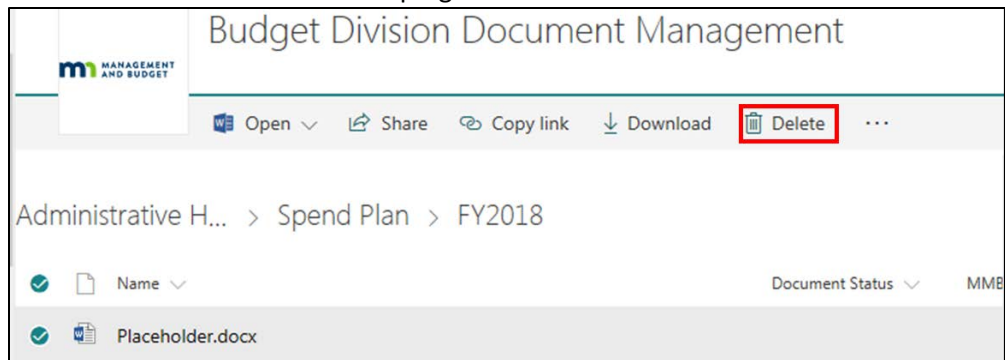
4. Once the upload is complete, the document will appear in that folder.

## **Deleting a Document**

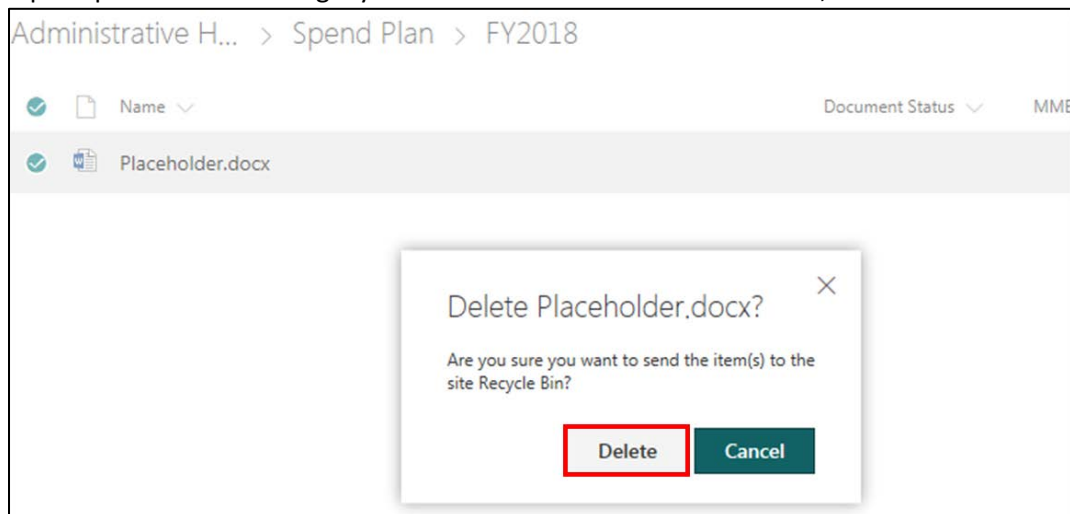
1. Select the checkmark next to the document



2. Select the trash bin icon in the top right hand corner.

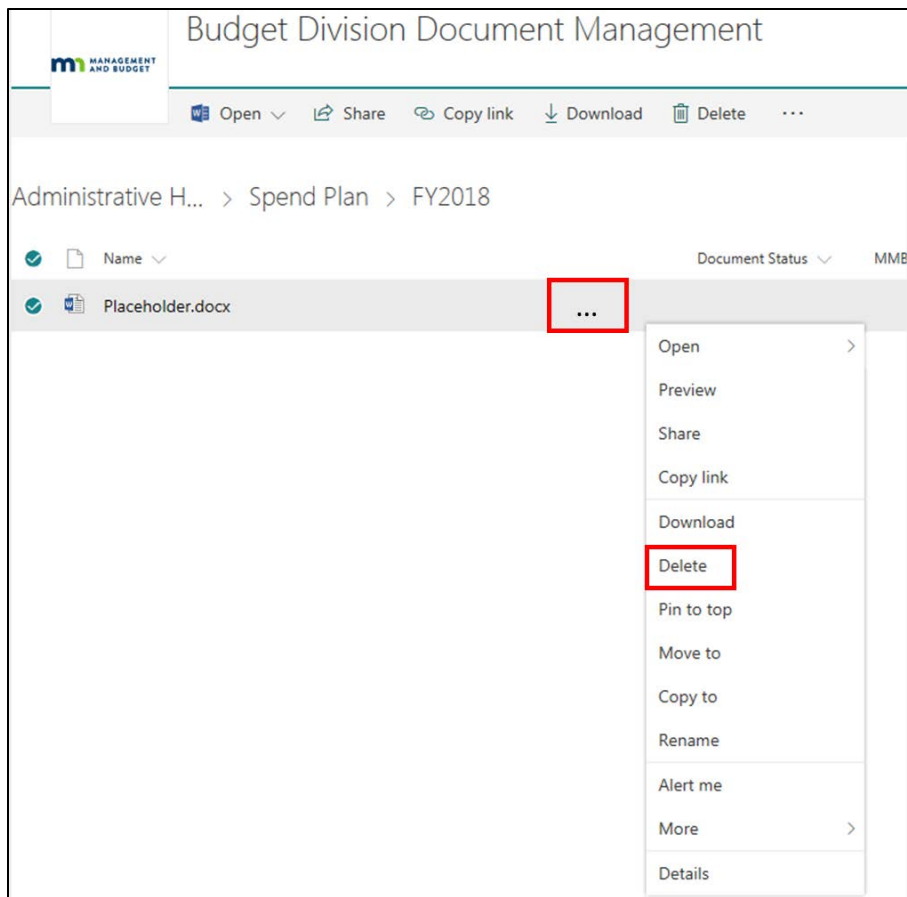


3. A prompt will follow asking if you would like to delete the document, click Delete

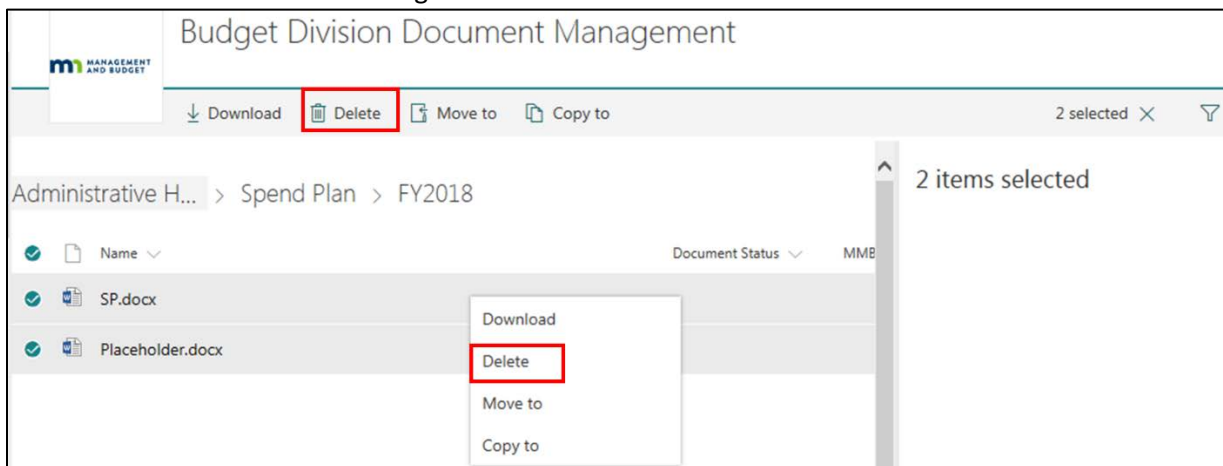


**OR**

4. Select the ellipsis to the right of the document name, then select the Delete option.

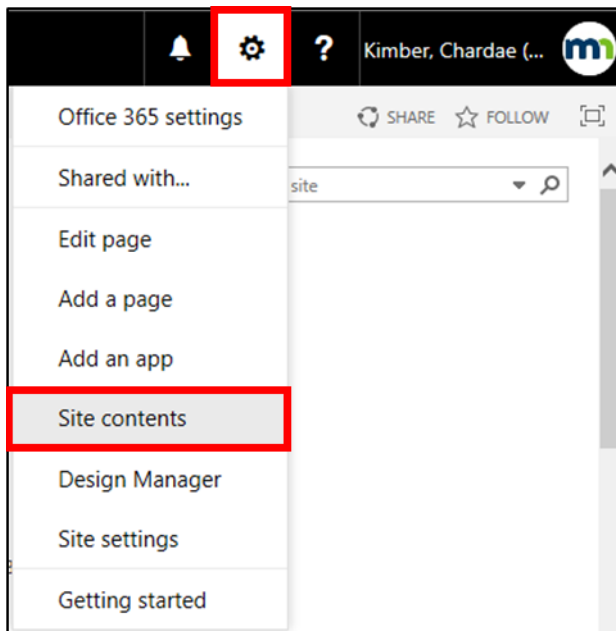


5. For deleting multiple documents, select the documents you would like to delete or use the select all button and either click Delete or right click and select Delete

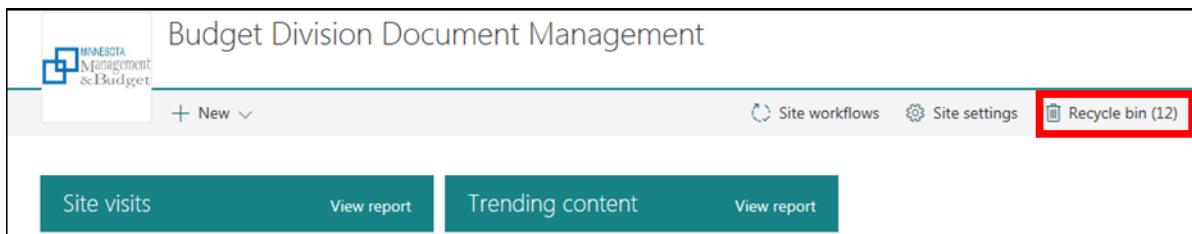


## **Recovering a Deleted Document**

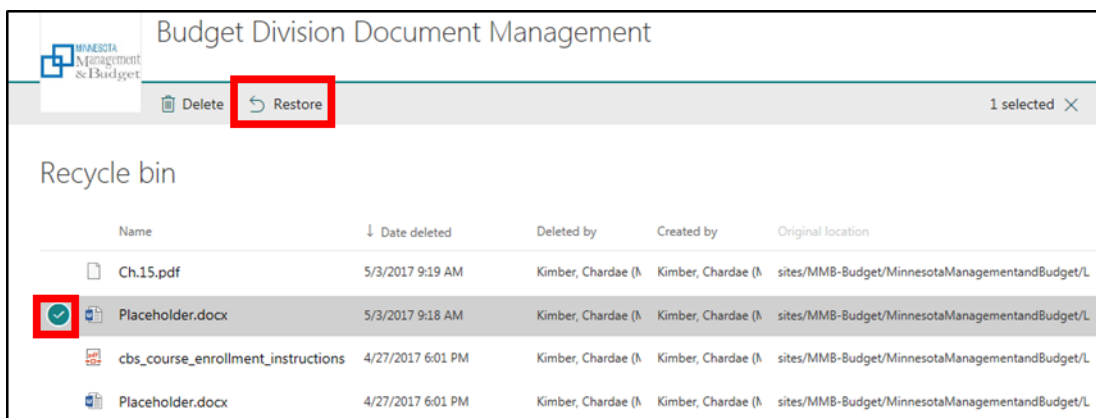
1. Click on the Settings cog on the right hand screen and select "Site Contents" from the drop down menu



2. Select the “Recycling Bin” icon at top right of the page



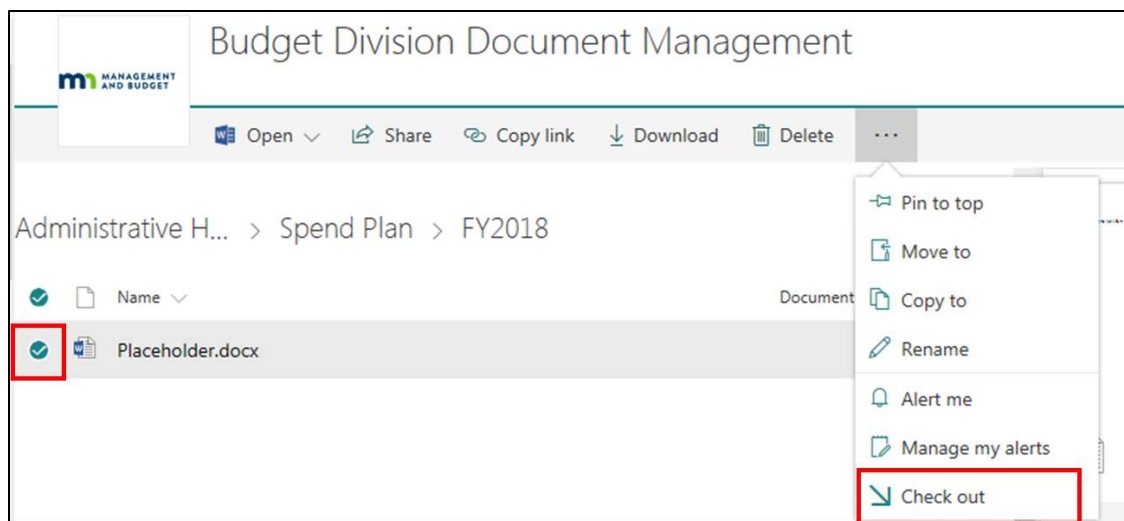
3. Click the check box next to the document you wish to restore and select “Restore”



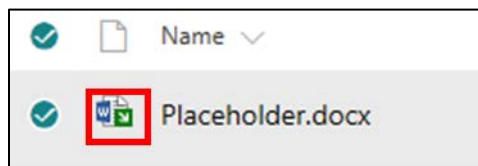
## **Editing a Document**

The best way to ensure that changes to a document are saved properly is to check out the document to edit and check in the document once edits are completed.

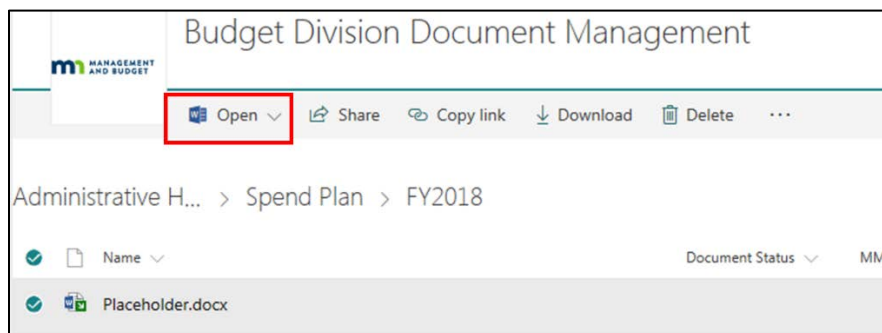
1. Select the checkbox next to the document you wish to edit and click on ellipsis at the top right hand corner. Select Check Out from the drop down menu.



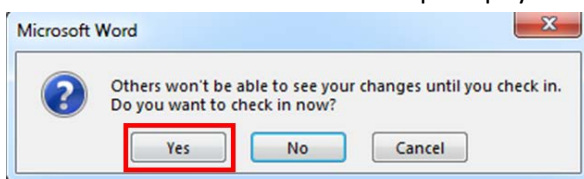
2. SharePoint will indicate in the top right hand corner that the document is being checked out. To ensure that the document has been checked out to you for editing, there should now be a small green arrow at the bottom of the document icon.



3. Click on the document you just checked out and select Open it to make all of your changes.

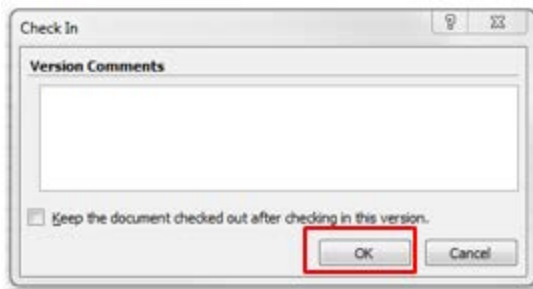


4. Save the document when you are finished editing.
5. Exit out of the document. This will prompt you with a message to check in your document. Select "Yes."

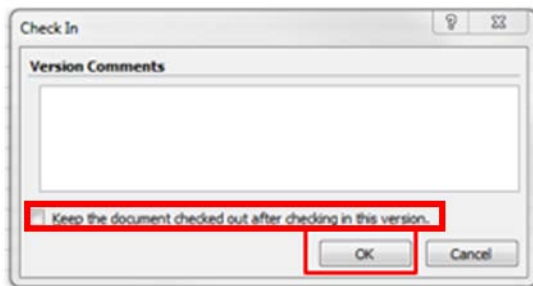


*Note: You must check in the document before anyone else can make changes to the file.*

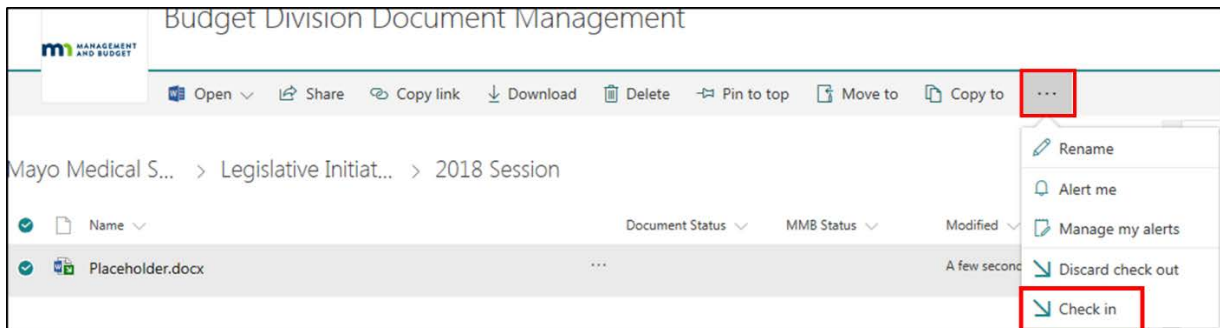
6. A window to add comments will pop up. Version comments are optional, however, you must click "OK" whether you add comments or not in order to check the document back in. If you want to keep the document checked out after making changes, check the box that says "Keep the document checked out after checking in this version."



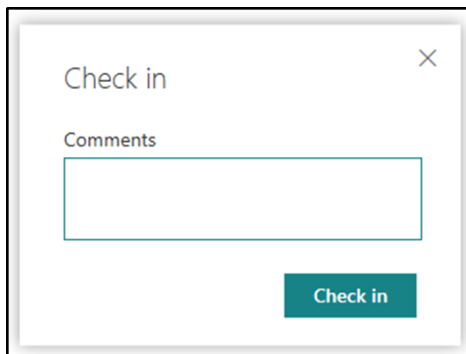
7. The SharePoint page should refresh automatically within a matter of seconds. If not, click F5 to refresh the page. The “Check In” button should no longer be selectable and the green “Checked Out” arrow should no longer be at the bottom of the document.
8. (Optional) Click on name of the file to view and make sure all changes were saved.
9. If you want to keep the document checked out after making changes, check the box that says “Keep the document checked out after checking in this version.” and the OK button.



10. To check the document back in, select the ellipsis and “Check In”.



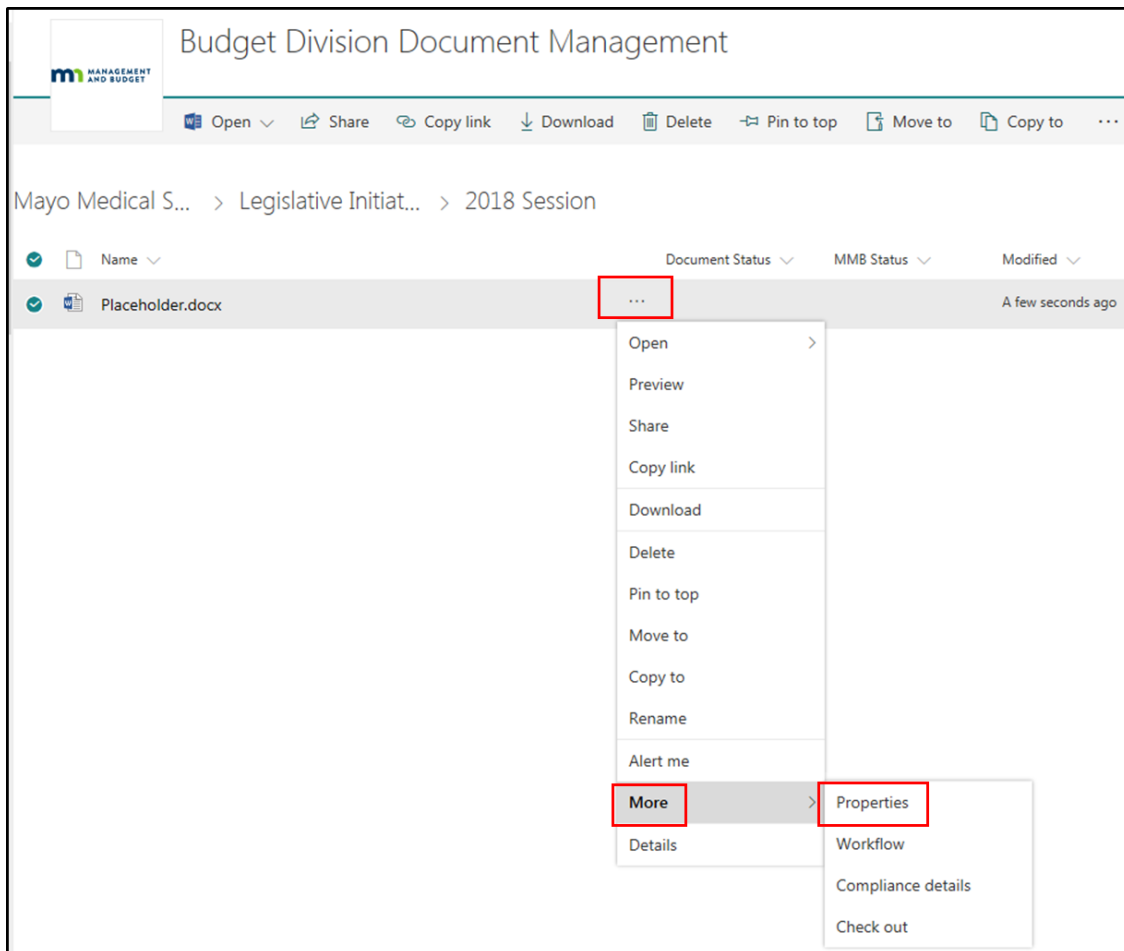
11. Add comments if you wish and click the Check in button.



## **Editing Document Properties**

1. To change the name or status of a document, select the document.

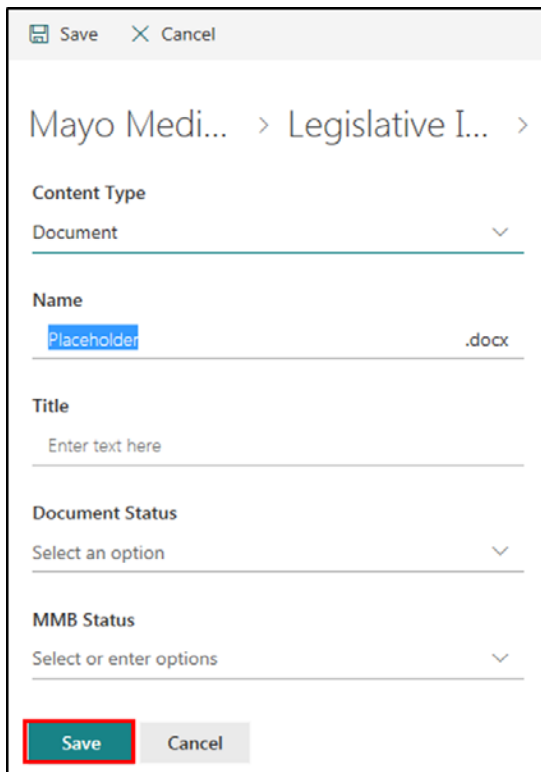
2. Select the ellipsis next to the document name.
3. Select the More option and Properties.



4. A screen will open, select Edit All, which allows you to edit the document properties.



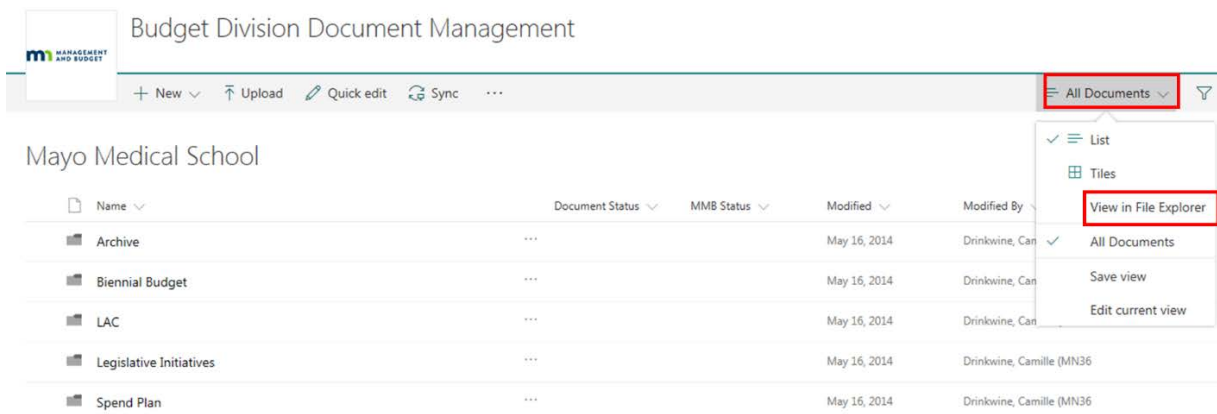
5. Make the appropriate changes and click Save.



A screenshot of a document save dialog box. The window has a title bar with 'Save' and 'Cancel' buttons. The breadcrumb path is 'Mayo Medi... > Legislative I... >'. The 'Content Type' is set to 'Document'. The 'Name' field contains 'Placeholder.docx'. The 'Title' field has a placeholder 'Enter text here'. The 'Document Status' is set to 'Select an option'. The 'MMB Status' is set to 'Select or enter options'. At the bottom, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red rectangle.

## **Printing Document(s)**

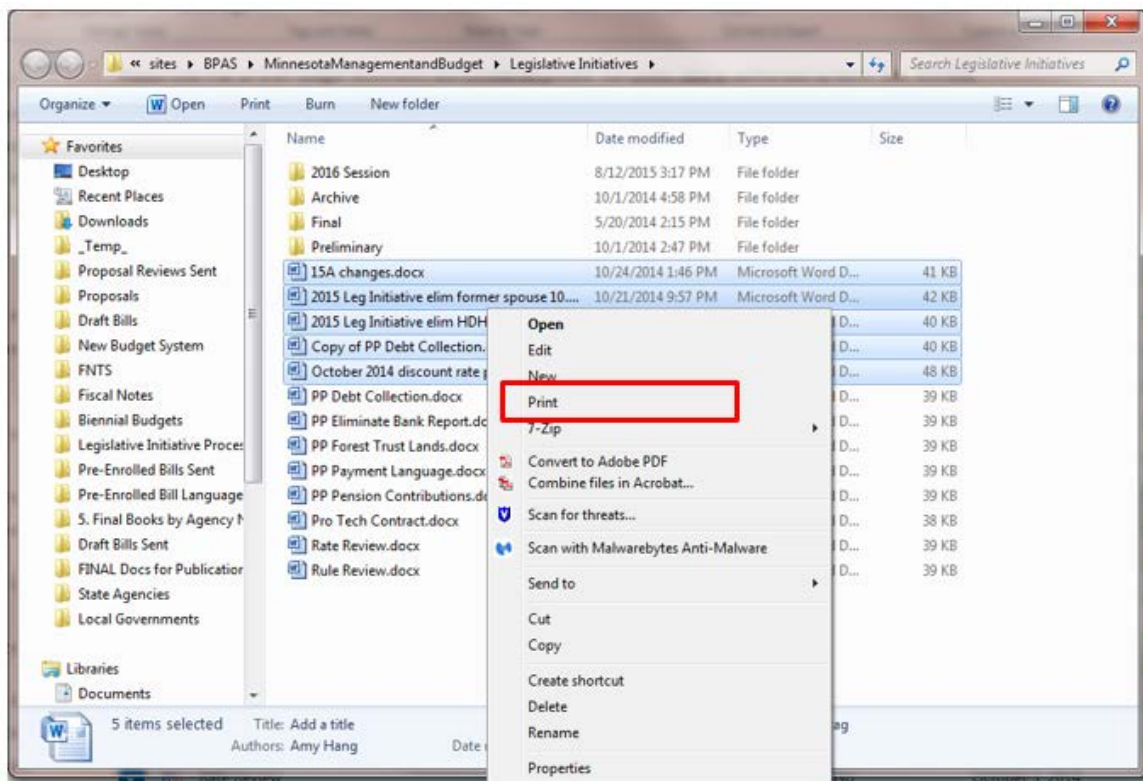
1. Navigate to the folder where your documents are located
2. Select the All Document drop down on the right hand side of the screen
3. Select View in File Explorer



A screenshot of the 'Budget Division Document Management' interface. The header shows the 'm MANAGEMENT AND SUPPORT' logo and the title 'Budget Division Document Management'. Below the header is a toolbar with buttons for '+ New', 'Upload', 'Quick edit', 'Sync', and a menu icon. The main content area is titled 'Mayo Medical School' and displays a table of documents. The table has columns for 'Name', 'Document Status', 'MMB Status', 'Modified', and 'Modified By'. The documents listed are 'Archive', 'Biennial Budget', 'LAC', 'Legislative Initiatives', and 'Spend Plan'. On the right side of the interface, there is a dropdown menu labeled 'All Documents'. A red rectangle highlights this dropdown, and another red rectangle highlights the 'View in File Explorer' option in the dropdown menu.

Name	Document Status	MMB Status	Modified	Modified By
Archive	...	...	May 16, 2014	Drinkwine, Can
Biennial Budget	...	...	May 16, 2014	Drinkwine, Can
LAC	...	...	May 16, 2014	Drinkwine, Can
Legislative Initiatives	...	...	May 16, 2014	Drinkwine, Camille (MN36)
Spend Plan	...	...	May 16, 2014	Drinkwine, Camille (MN36)

4. Select the documents you wish to print, right click, and select "Print".

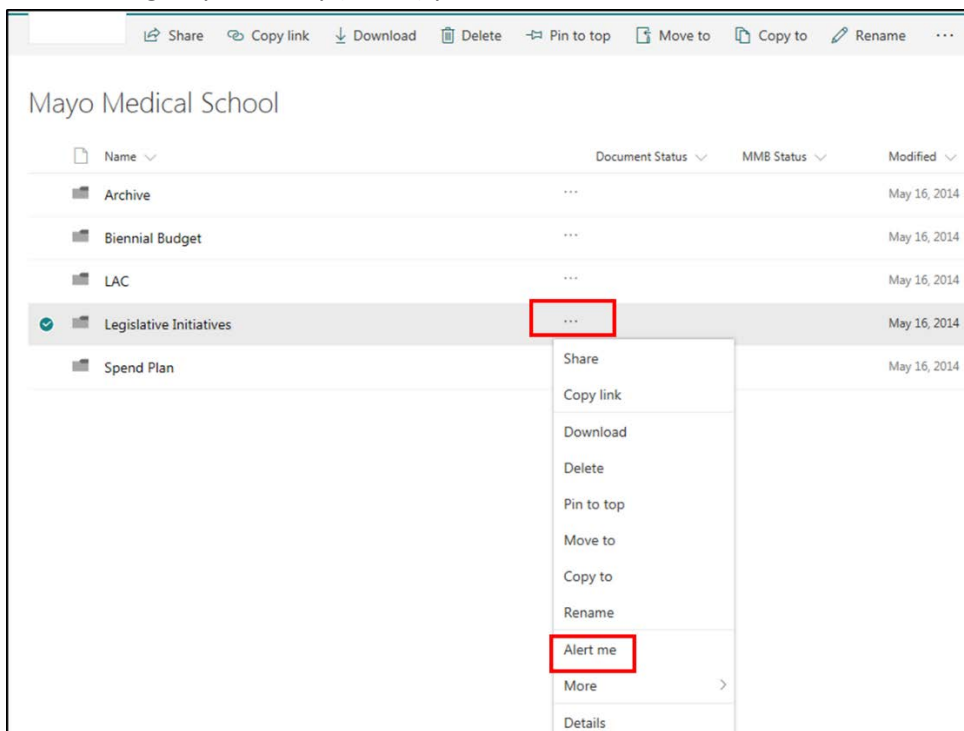


5. Close the window when you have finished printing by clicking on the “X” in the upper right hand corner of the screen.

## **Alerts Notifications**

Users can set up email notifications from this SharePoint site when changes are made to any agency library.

1. Select the agency or library (folder) you wish to receive notifications for.





2. Select the ellipsis next to the right of the name.
3. Select Alert Me
4. Select your alert preferences:
  - a. Send Alerts To
  - b. Delivery Method
  - c. Change Type
  - d. Send Alerts for These Changes
  - e. When to Send Alerts
5. Click the OK button in the bottom right corner of the screen.

Alert me when items change

Enter the title for this alert. This is included in the subject of the notification sent for this alert.

Mayo Medical School: Legislative Initiatives

**Send Alerts To**  
You can enter user names or e-mail addresses. Separate them with semicolons.

Users:  
Rupp, Robyn (MMB) x

**Delivery Method**  
Specify how you want the alerts delivered.

Send me alerts by:  
☒ E-mail robyn.rupp@state.mn.us  
☐ Text Message (SMS)  
☐ Send URL in text message (SMS)

**Change Type**  
Specify the type of changes that you want to be alerted to.

Only send me alerts when:  
☒ All changes  
☐ New items are added  
☐ Existing items are modified  
☐ Items are deleted

**Send Alerts for These Changes**  
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:  
☒ Anything changes  
☐ Someone else changes a document  
☐ Someone else changes a document created by me  
☐ Someone else changes a document last modified by me

**When to Send Alerts**  
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

Send notification immediately  
☐ Send a daily summary  
☐ Send a weekly summary

Time:  
 Thursday 10:00 AM

OK Cancel

## **Manage Alerts**

To manage your alerts on your libraries (folders).

1. Click on the ellipsis
2. Select Manage my alerts

Budget Division Document Management

MANAGEMENT AND BUDGET

+ New Upload Quick edit Share Copy link Sync Download ...

Mayo Medical S... > Legislative Initiatives

Alert me  
Manage my alerts

Name	Document Status	MMB Status	Modified
2015 Session	...	Agency Preparation	August 19, 2015
2016 Session	...		August 12, 2015
2017 Session	...		June 28, 2016
2018 Session	...		July 27

3. Select alerts to delete by clicking the check box next to the library.
4. Click on "Delete Selected Alerts"
5. Alerts can also be added through this screen.

Budget Division Document Management EDIT LINKS

## My Alerts on this Site

Add Alert Delete Selected Alerts

Alert Title

Frequency: Daily

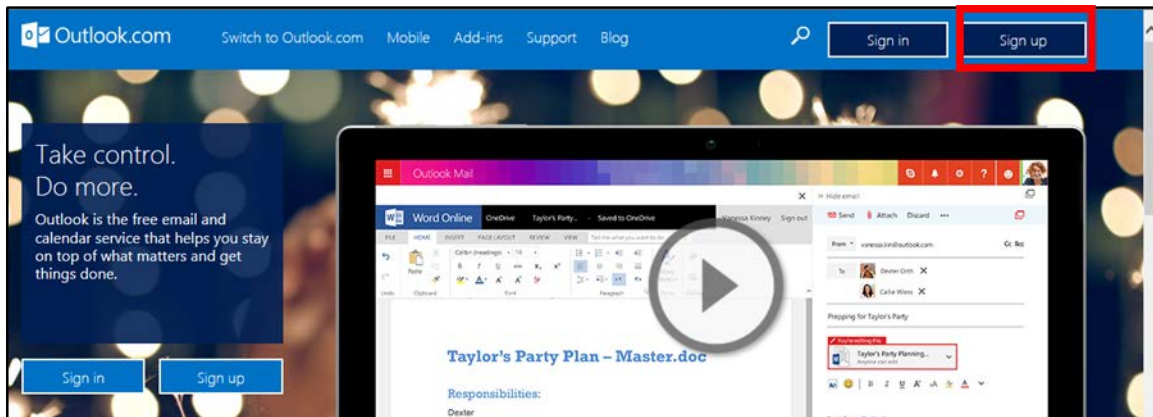
- ☒ Behavioral Health and Therapy Board
- ☒ Administration Department
- ☐ Public Employees Retirement Association
- ☐ MNSure
- ☐ Transportation Department

## Appendix A: Non-MNIT Network Users (External Users)

### Creating an Account

In order to gain access to the SharePoint site, each individual that needs access will need to create an email account with Microsoft Outlook.

1. Go to the Microsoft Outlook website [here](#) and select the “Sign Up” button (you will need to create a new email even if you already have a personal Microsoft email).



2. Fill out the fields to create a new account. Use the following naming convention: [firstname.lastname@outlook.com](#) in the “User Name” field. Enter in a password. Birthdate is required to move on, however you may enter any year.

Microsoft

Create an account

If you already sign in to a Windows PC, tablet, or phone, Xbox Live, Outlook.com, or OneDrive, use that email address to [sign in](#). Otherwise, create a new Outlook.com email address.

First name

Last name

Carolina

Herrera-Vasquez

User name

carolina.herrerasvasquez@outlook.com

carolina.herrerasvasquez@outlook.com is available.

Password

8-character minimum; case sensitive

Reenter password

Country/region

United States

Birthdate

May

25

1910

Gender

Select...

Help us protect your info

Your phone number helps us keep your account secure.

Country code

United States (+1)

Phone number

3. Enter your agency issued email address in the “Alternate email address” field so that backup emails will be sent to this email address.

Help us protect your info

Your phone number helps us keep your account secure.

Country code

United States (+1) ▼

Phone number

Alternate email address

carolina.herrera@mnhs.org

Before proceeding, we need to make sure a real person is creating this account.

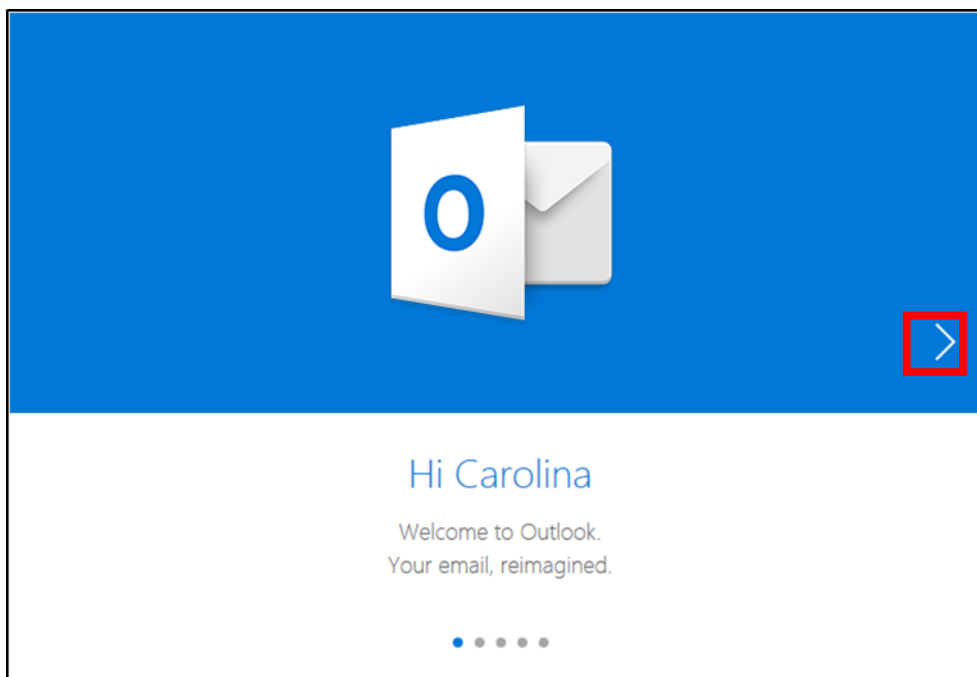
4. Uncheck the box that says “Send me promotional offers from Microsoft” at the end of the form then select “Create Account.”

☒ Send me promotional offers from Microsoft. You can unsubscribe at any time.

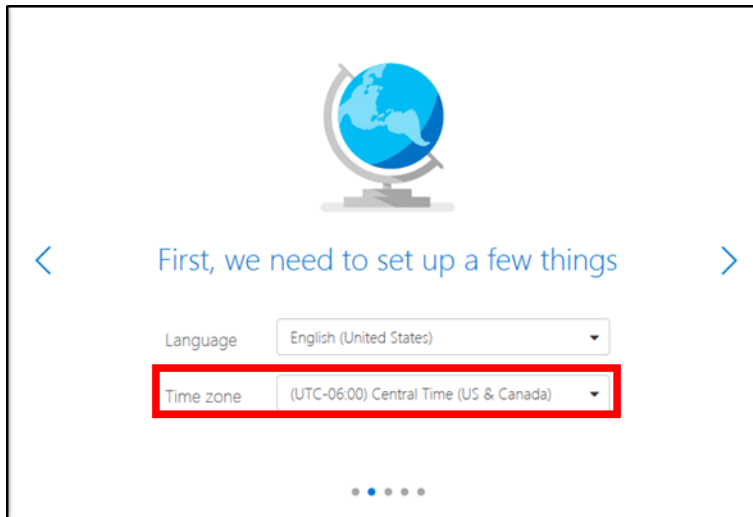
Clicking Create account means that you agree to the [Microsoft Services Agreement](#) and [privacy and cookies statement](#).

Create account

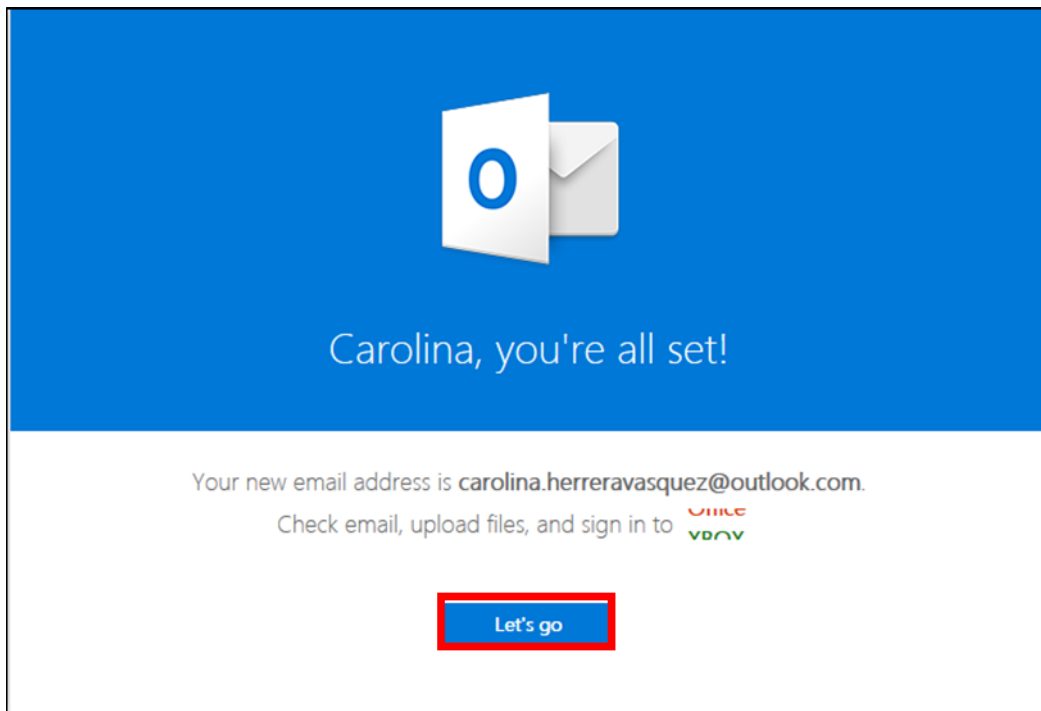
5. Click past the first screen leading to your newly created email account.



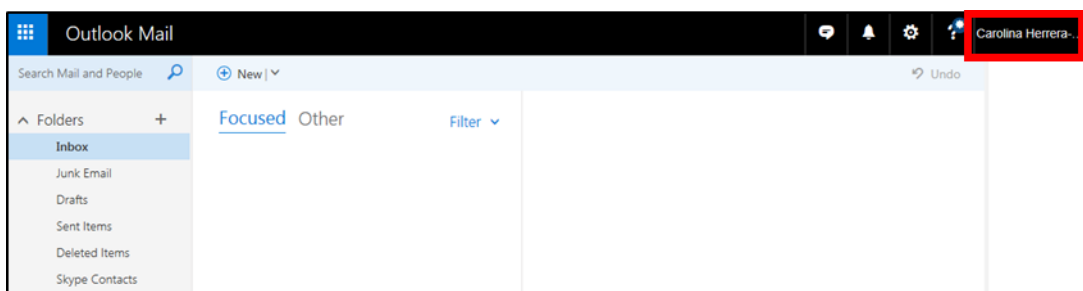
6. Check the Time Zone to Central Time.



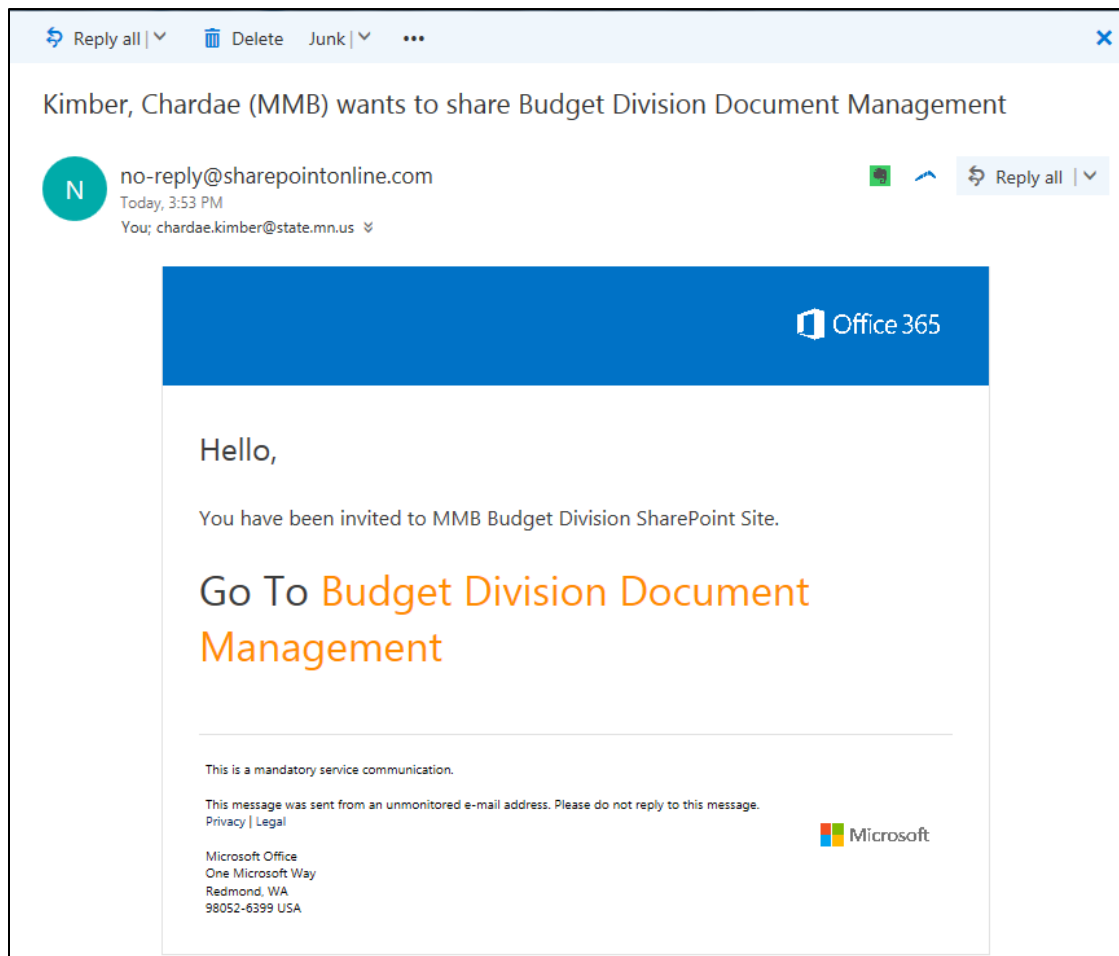
7. Once the email account is set up, you will see this screen. Select "Let's go."



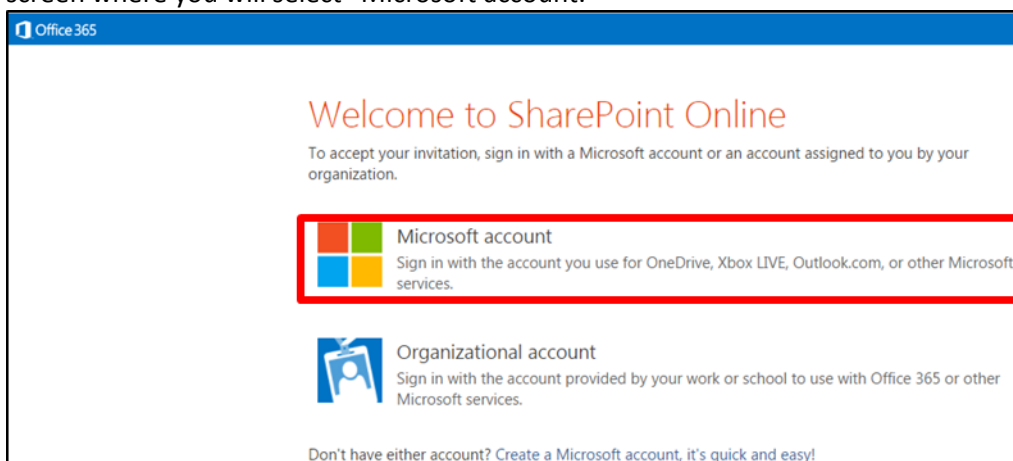
8. The email inbox front screen will open and your name will be in the upper left hand corner.



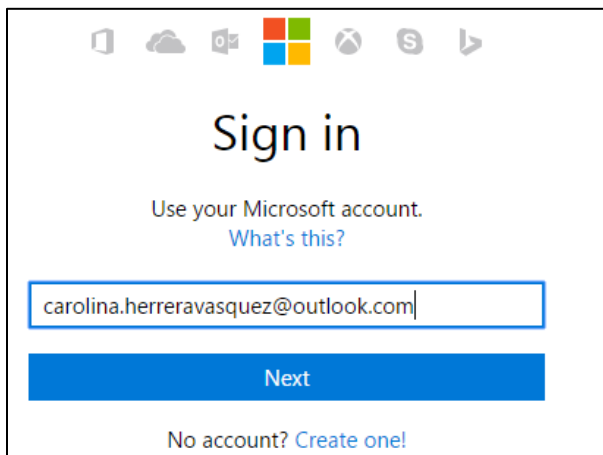
9. Send MMB your email address ([firstname.lastname@outlook.com](mailto:firstname.lastname@outlook.com)) and Budget Operations will send you an invitation for your agency to this email address.
10. Click on the email that you receive from MMB Budget Operations and it will direct you to the MMB Budget Division SharePoint Site.



11. Once you select the website from the email, it will bring you to a “Welcome to SharePoint Online” screen where you will select “Microsoft account.”

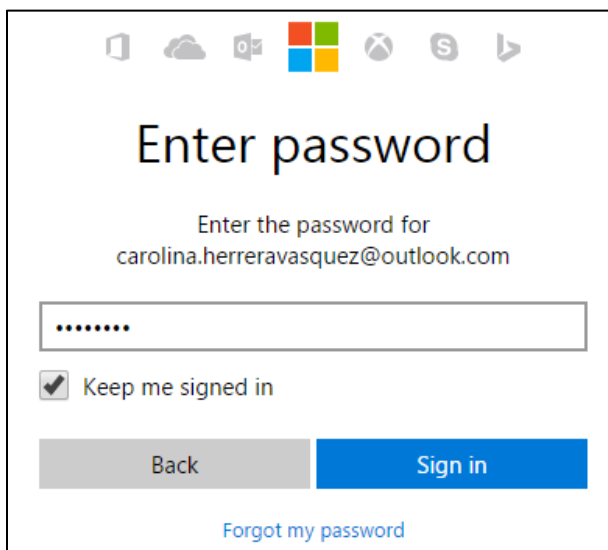


12. Sign in using your Microsoft Outlook email address.



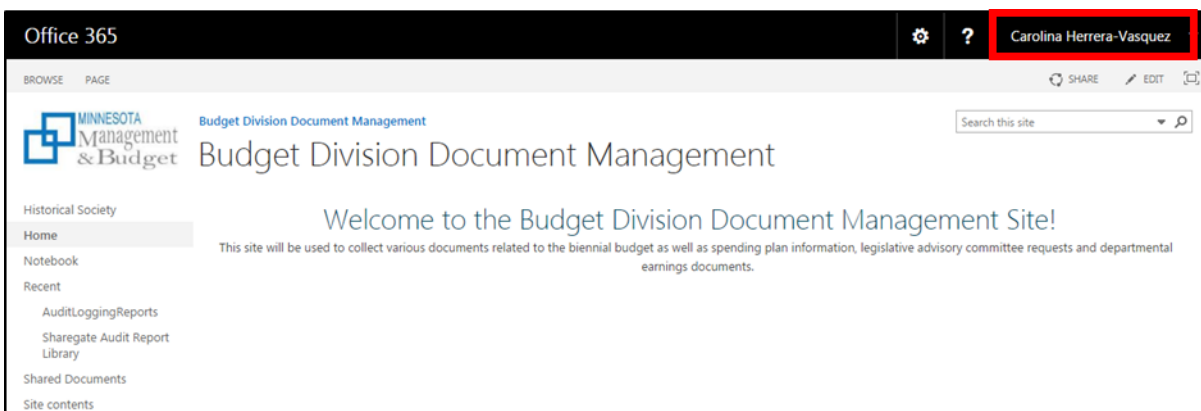
The image shows the Microsoft sign-in interface. At the top, there are icons for various Microsoft services. The main heading is "Sign in". Below it, the text says "Use your Microsoft account." with a link "What's this?". A text input field contains the email address "carolina.herreravasquez@outlook.com". Below the input field is a blue "Next" button. At the bottom, there is a link "No account? Create one!".

13. Enter in your password, select the "Keep me signed in" button, then select "Sign in."



The image shows the Microsoft "Enter password" screen. At the top, there are icons for various Microsoft services. The main heading is "Enter password". Below it, the text says "Enter the password for carolina.herreravasquez@outlook.com". A password input field is shown with dots. Below the input field is a checkbox labeled "Keep me signed in" which is checked. Below the checkbox are two buttons: "Back" and "Sign in". At the bottom, there is a link "Forgot my password".

14. Once you log in, you should see your specific agency information. Your name will appear in the left upper hand corner.

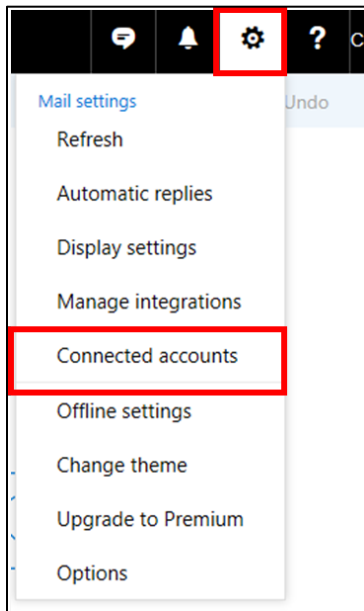


For additional information, please see the Microsoft External Partner Accounts document [here](#).

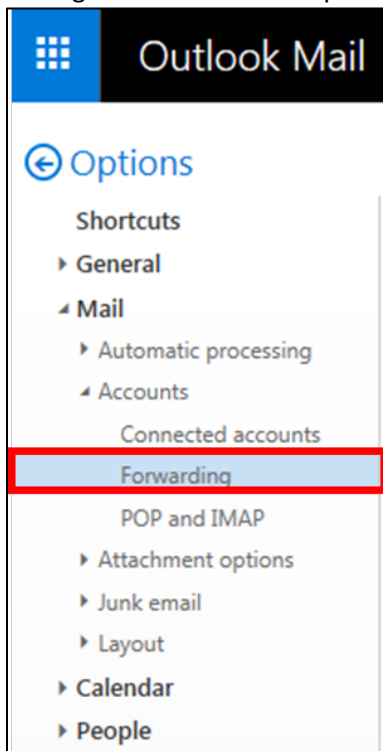
## Alerts

If you plan on setting an alert for any folders in your library, the notification will be sent to your Microsoft account email. In order to redirect these emails, you will need to forward all emails to your employee email address.

1. In your Microsoft account email, go to your inbox and select the Settings cog in the top right hand side and select Connected Accounts

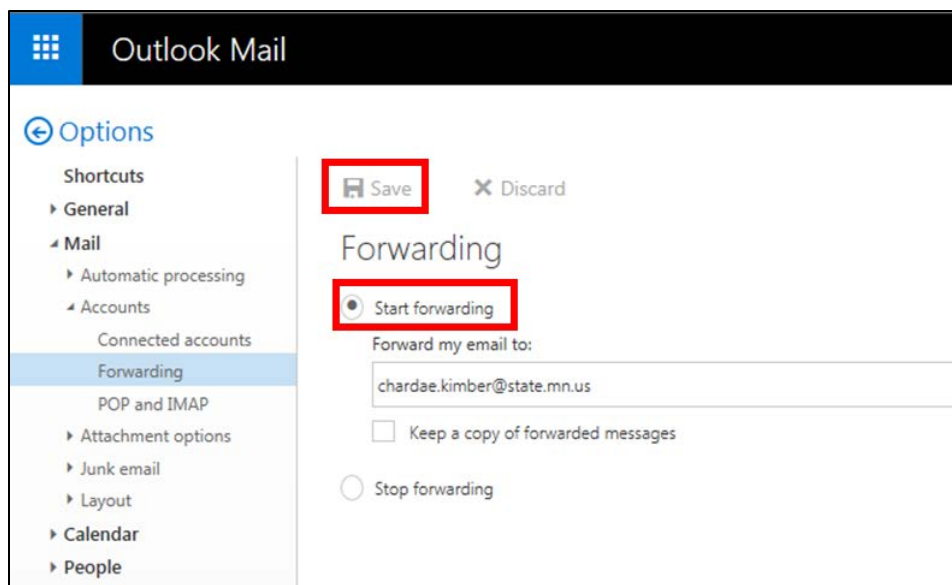


2. The right hand menu will open the Accounts tab, select the section titled Forwarding



3. Select Start Forwarding and enter your employee email address, then hit Save at the top





4. This will ensure that any emails you receive due to alerts from the SharePoint site will be sent to your employee email address. You can then set up a rule in your Outlook mail that places all emails that are forwarded from your Microsoft account into a separate folder in your inbox.